

## **Transformative Learning Following Job Loss: A Dissertation Renewal**

Robert Benway

### **Abstract**

This study renews a doctoral dissertation written in 2003 on transformative learning following job loss. An abbreviated literature review compares corporate and worker circumstances from the original study to the present time. Findings show that corporations choose reductions in force due to pressure from investors instead of productivity, and worker victims of job loss typically have a much more difficult time re-entering the workforce now than previously.

**Keywords:** transformative learning, personal values, frames of reference, psychological contract, authentic leadership

### **Transformative Learning Following Job Loss-A Dissertation Renewal**

In June of 2003, I finished my doctoral dissertation, titled *Perspective Transformation in Mid-Career Workers Following Job Loss*. The title told my story, since I was furloughed twice from two senior management positions, specifically, an Assistant Vice President position lost in 1991 and a Vice President of Operations position lost in 1996. I had a lot of time to think about the above circumstances, being six months out of work the first time and 14 months the second time. I will tell you about what I learned from the 2003 dissertation, but first I need to tell you that because it has been 14 years since I wrote it, I figured it was time to renew it to find out what changed.

A great deal changed, as it turns out, but some things remained the same. I will deal with what I learned the first time around, and then I will discuss what has changed and what has not changed. What I learned in 2003 when I wrote the dissertation depended a lot on the corporate, political, and global landscape. I did not know this at the time but discovered it when I began the renewal this year: the corporate, political, and global changes significantly changed impacted the career opportunities.

### **Backstory and Dissertation Findings**

In 2003, most of the research participants I interviewed took control over their lives after they lost their jobs (Benway, 2004). They discovered they did not have to allow their employers to compromise their personal values. They reprioritized their frames of reference from company focus to personal focus. They processed these changes by questioning their assumptions. They learned to control their balance between work and personal time. They also learned to focus personal values with social concerns and actions.

By the time I wrote this dissertation, I had lost two jobs, one in 1991 and the other in 1996. In 1991, I was out of work six months and then landed a new position at a starting salary 13% higher than what I previously earned. In 1996 I was out of work 13.5 months and landed a lower position at a starting salary almost 30% lower. So I knew conditions would not be the same, but I did not anticipate how much different they became.

### **Corporate and Worker Changes Since 2003**

I was so fixated on writing my dissertation it never occurred to me that the socioeconomic landscape could have changed so drastically. What I did not pick up at the time was that corporate, political, and geographic worlds would change in ways I could never have imagined. This brings me to the present, as I decided to renew my dissertation and find out what changes occurred in the corporate and worker environments.

There have been drastic changes in the corporate environment. Employer-employee relations have taken a transactional character at the expense of earlier psychological contracts (Betts, Healy, Mir, & Vicari, 2015). Reductions in force (RIFs) are no longer triggered by the need to increase productivity; rather, they are directed by senior executives in response to investor demands to increase return on investment (ROI). Note that ROI is the ratio of net income to capital deployed. Decreasing capital deployed by conducting RIFs is easier and faster than increasing net income as a means of increasing ROI.

Changes in the worker environment have been due mostly to the changes in the corporate environment. Workers have become wary of employer expectations since downsizing is now triggered by exigencies (demands) of the stock market, not falling changes in productivity (Betts et al., 2015). Survivors of downsizing experience diminished employee morale and lower levels of mental health (Anderson & Proulx, 2014). Victims of downsizing report higher job satisfaction, better quality of life and overall health than survivors. Displaced workers lost jobs and have small likelihood of being recalled. They possess skills no longer desired, so are different from unemployed workers. Retraining becomes a cost/benefit analysis to the worker.

### **Comparisons of Transformative Learning and Authentic Leadership**

Transformative learning is an adult education learning theory that is well known in communities inside and outside education. So when I began reading Bill George's (2015) book *Authentic Leadership* in preparation for a business course I was about to teach, it took me a while to recognize the phenomena George described is very similar to perspective transformation as described by Jack Mezirow (1991). What follows is a synopsis of the similarities.

First, the disorienting dilemma Mezirow described is very similar to crucibles as described by George, both stimulating changes in thinking. Second, the Mezirow self-examination with feelings of guilt or shame is similar to George's losing your way. Next, the Mezirow critical assessment of assumptions, recognition that discontent and transformation are shared, exploration of options, planning a course of actions, acquisition of knowledge, and provisional trying of new roles are all similar to George's self-awareness. Finally, the Mezirow building of competence and confidence, and reintegration into a new life, are similar to George's comments on values.

For me, Mezirow described almost exactly the perspective transformation I experienced, and George put it in the context of business environments, thus allowing me to better understand myself and the environment in which I work, in healthcare, business, and higher education.

### **Future Trends and Influences**

Future trends of corporations on reengineering and restructuring of the work forces continue perilous pathways, at least for employees. Mangaliso and Culhane (2009) pointed out that downsizing results in decreased employee morale among surviving employees, decreased productivity (because surviving employees must assume responsibilities formerly carried out by departed employees), and a resulting deficit of skills among surviving employees. Therefore, they suggested that future layoffs should be done in one round instead of multiple rounds. They also claimed:

For reengineering to succeed in the long run, it must encompass a reevaluation of the entire organization and culture, including the hierarchical structure, the traditional positions within that structure, and the reassigning of individuals to match skills to requirements in the new order (p. 13).

If workers who have been affected by downsizing experienced perspective transformations, what changes have they made, and to what extent will those changes be lasting? Studies reviewed by Stein (2007) indicated that workers experience a feeling of helplessness, becoming victimized by actions that cannot be prevented, and loss of hope and spirit. Although these changes may or may not be lasting, there is evidence that meaning schemes such as changes in basic beliefs and assumptions can and do change (Courtenay, Merriam, Reeves, & Baumgartner, 2000). Displaced workers react to job loss and reemployment in different ways. Some get into new jobs right away, some hesitate, some are in denial, and some quit looking for work or retire. (Entz, 2010).

There are also political influences at play. Frank (2016) argued the New Deal attention paid to the working class gradually eroded and transitioned to the professional class, which then further eroded as money and power shifted to the upper class in the form of

income increases, tax cuts, legislative changes, and judicial rulings such as Citizens United.

### **Implications for Adult Education and Writing**

I knew the landscape of business would change when I first wrote my dissertation in 2003, but the landscape transformed the entire context of my dissertation. The consequences 25 years ago were that victims of job loss spent three to six months out of work and then became re-employed at or higher than their former salaries. Those conditions deteriorated, as discussed above, such that some occupations, especially those of offshored employees, do not even exist now, thus forcing victims to transition into new occupations that may require retraining. Such retraining may not be realistic or within reach. So, the assumptions I used to write my 2003 dissertation simply no longer exist, and consequences to adult education must be approached in fluid terms.

A second implication for adult education considers the attention devoted to the corporate viewpoint in the literature, with relatively little consideration of worker dilemmas. This imbalance extends to business classrooms, where “a significant portion of the current round of critique of business schools stems from their inability to advocate social responsibility, and to ensure that corporations earn their putative role as servants of society and allocators of social product” (Betts et al., 2015, p. 25). Business schools must summon the courage to balance multiple viewpoints in order to fairly represent the positions of corporations, the upper class, professional class, and working class. An example of how to do this is to organize a class activity in which students are divided into small groups, mimicking work groups in a company (McAteer, 2010). Then, the instructor, representing management, fires one or two of the students, assigns them to different groups, and then resets the assignment. The intention is to simulate a reduction in force in the company with reassignment of workers to other groups, and then have students examine the experience from the workers’ viewpoint.

This paper has implications for writers. “There is no greater agony than bearing an untold story inside you,” wrote Maya Angelou. Maybe that is the source of intestinal fortitude I discovered in writing this paper. For years I thought of revisiting my dissertation but put it off because I was not able to find a vehicle or excuse to take on the project. Over time my curiosity got the better of me, and then the Adult Higher Education Alliance (AHEA) announced a call for papers related to the AHEA 2017 Annual Conference on the subject of writing. I realized this presented an opportune time to revisit the original project, at least in literature review. But because I volunteer at a career center and regularly see displaced professional and working class people, I have observed and worked with victims whose stories are similar to the ones written about and documented above. This recent examination of the original subject does not have

the rigor of the original work, but enough to help me recognize that research and writing captures a moment in time.

## References

- Anderson, S., & Proulx, J. (2014). *Stress-related outcomes of organizational downsizing: A systematic review of 21st century literature*. Retrieved from <https://www.islandscholar.ca/islandora/object/ir:9551>
- Benway, R. (2004). *Adult learning following job loss in mid-career workers*. Retrieved from <https://scholarworks.iupui.edu/bitstream/handle/1805/230/Benway.pdf?sequence=1>
- Betts, S., Healy, W., Mir, R., & Vicari, V. (2015). The impact of offshoring on organizational commitment: Recruiting, training, retention, and ethical concerns. Retrieved from <http://www.alliedacademies.org/pdfs/proceedings26/ASIB%20Proceedings.pdf#page=13>
- Courtenay, B., Merriam, S., Reeves, P., & Baumgartner, L. (2000). Perspective transformation over time: A 2-year follow-up study of HIV positive adults. *Adult Education Quarterly*, 50(2), 102-119. doi:10.1177/07417130022086937
- Entz, M.J. (2010). *Beyond the factory floor: The experiences of displaced manufacturing workers as they retrain in community college settings* (Doctoral Dissertation), Iowa State University, Ames, Iowa. Retrieved from <http://lib.dr.iastate.edu/cgi/viewcontent.cgi?article=2716&context=etd>
- Frank, T. (2016). *Listen liberal: Or, what ever happened to the party of the people*. New York, NY: Metropolitan Books.
- George, B. (2015). *Discover your true north* (2nd ed.). Hoboken, NJ: Wiley & Sons.
- Mangaliso, M., & Culhane, J-M. (2009). *Performance implications of the corporate downsizing strategy*. Retrieved from [https://papers.ssrn.com/sol3/papers.cfm?abstract\\_id=1695416](https://papers.ssrn.com/sol3/papers.cfm?abstract_id=1695416)
- McAteer, T. (2010). *Transformative learning in business education*. Retrieved from <http://www.nationalpost.com/transformative+learning+business+education/2495255/story.html>
- Mezirow, J. (1991). *Transformative dimensions of adult learning*. San Francisco, CA: Jossey-Bass.
- Stein, H. (2007). The inconsolable organization: toward a theory of organizational and cultural change. *Psychoanalysis, Culture & Society*, 12, 349-368. Retrieved from <http://www.psychohistoire.com/Stein%20onconsolable%20Organization.pdf>

**Robert Benway** has served as a full time Assistant Professor at National Louis University since 1998. He has also served 6 years as an Associate Dean for the College of Management and Business, from 2008 to 2014. After working on the merger of the Colleges of Arts, Sciences, Management and Business, he returned to his first love, teaching. During his career, he has published book chapters, papers, and newsletters on topics in health care leadership, business communication, business leadership, management, and human resources. He has presented at national conferences, and maintains professional memberships in health administration, business management, and adult education. He spent the first half of his career working in health care as a clinical staff, supervisor, manager, director, and senior level positions over 20 years. He holds a Ed.D in adult education, MBA in management, and a BS degree in biology.